NATIONAL SURVEY on GAMBLING ATTITUDES and GAMBLING EXPERIENCES

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National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

DETAILED REPORT
MINNESOTA
May, 2019
About the National Survey on Gambling Attitudes and Gambling Experience (NGAGE)

• NGAGE is a national survey commissioned by the National Council on Problem Gambling and conducted in November, 2018
  • The survey was taken online by IPSOS, one of the world’s largest public opinion companies

• The survey covered a wide range of topics relating to gambling and problem gambling
About NGAGE (cont.)

• 501 adults were sampled in Minnesota
  • Additional sports bettors were interviewed for a total sample of 202 for sports betting questions

• A sample of this size has a “credibility interval” of +/- 5%
  • A credibility interval is the equivalent of a confidence interval, but adapted for online panels as used in this survey.

• All data presented in this report are for Minnesota unless otherwise noted.
Minnesotans like to gamble
• 78% of Minnesota adults reported making a bet in the past year

And they bet on many things
• The average Minnesota gambler bet on 4 activities in the year before the survey. 1 in 4 wagered on 7 or more.

The lottery is the most popular form of gambling in Minnesota
• 66% of Minnesota adults reported a past year lottery purchase
• Minnesota is among the states where residents are most likely to play bingo or buy a pull-tab

Sports betting is relatively uncommon
• 19% of Minnesotans reported betting on a sports event

Most gamble for fun
• 81% of past year gamblers believe that gambling is not a good way to make money

Many Minnesotans misunderstand problem gambling
• 77% believe that a lack of willpower is a cause of problem gambling
Past year gambling

- Any gambling: Minnesota 73%, U.S. 78%
- Lottery: Minnesota 66%, U.S. 66%
- Raffle: Minnesota 41%, U.S. 46%
- Spending money at a casino: Minnesota 37%, U.S. 44%
- Slots/gaming machine: Minnesota 34%, U.S. 32%
- Card games: Minnesota 24%, U.S. 23%
- Pull-tabs: Minnesota 21%, U.S. 35%
- Bingo: Minnesota 20%, U.S. 28%
Past year gambling (continued)

- Sports event/outcomes: Minnesota 19%, U.S. 20%
- Fantasy sports: Minnesota 17%, U.S. 17%
- Online wager: Minnesota 16%, U.S. 15%
- Horse or dog race: Minnesota 13%, U.S. 14%
- Spinning wheel games: Minnesota 11%, U.S. 14%
- Roulette: Minnesota 13%, U.S. 13%
- Craps or other dice games: Minnesota 13%, U.S. 13%
A note on histograms

- Histograms are a standard statistical graphic used to group numbers (such as the gambling participation rates in each of the 50 states) into ranges. The height of each bar represents the number of states that fall into each range. On the next chart, for example, you can see that only one state (Utah) has a gambling participation rate between 50% and 55%, while four states (Alaska, Mississippi, Nebraska and Wyoming) have rates between 65% and 70%. At the other end of the chart, 12 states have rates of 80% or higher. Almost half the states (23) have rates between 75% and 80%.
Past year gambling participation by state

National rate = 73%

MN

AZ, CT, IL, MA, MI, NH, NJ, NY, OH, PA, RI, TX

[50%, 55%]
[55%, 60%]
[60%, 65%]
[65%, 70%]
[70%, 75%]
[75%, 80%]
[80%, 85%]
Number of past year gambling activities

Median (total population) = 3  Median (past year gamblers) = 4
Past year gambling by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>67%</td>
<td>80%</td>
</tr>
<tr>
<td>25-34</td>
<td>75%</td>
<td>79%</td>
</tr>
<tr>
<td>35-44</td>
<td>75%</td>
<td>81%</td>
</tr>
<tr>
<td>45-54</td>
<td>81%</td>
<td>84%</td>
</tr>
<tr>
<td>55-64</td>
<td>77%</td>
<td>75%</td>
</tr>
<tr>
<td>65+</td>
<td>70%</td>
<td>69%</td>
</tr>
</tbody>
</table>
Past year gambling by gender
Lottery play

% of population playing once a year or more

<table>
<thead>
<tr>
<th>Category</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draw games such as Powerball or MegaMillions</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Daily numbers or keno-style games</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>Instant/Scratch games</td>
<td>56%</td>
<td>51%</td>
</tr>
</tbody>
</table>
Lottery draw game frequency

% of population playing ...

Weekly or more: U.S. 12%, Minnesota 12%
Once or more a month: U.S. 14%, Minnesota 15%
Several times a year: U.S. 18%, Minnesota 20%
Once or twice a year: U.S. 13%, Minnesota 16%
Less often than once a year: U.S. 17%, Minnesota 15%
Never: U.S. 26%, Minnesota 22%
Lottery instant/scratch game frequency

% of population playing...

- Weekly or more: U.S. 11%, Minnesota 7%
- Once or more a month: U.S. 13%, Minnesota 12%
- Several times a year: U.S. 16%, Minnesota 14%
- Once or twice a year: U.S. 14%, Minnesota 17%
- Less often than once a year: U.S. 19%, Minnesota 22%
- Never: U.S. 25%, Minnesota 27%
Past year lottery play by state

<table>
<thead>
<tr>
<th>State</th>
<th>Percentage of Population Playing Lottery in Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>[30%, 40%]</td>
</tr>
<tr>
<td>Hawaii</td>
<td>0</td>
</tr>
<tr>
<td>Utah</td>
<td>3</td>
</tr>
<tr>
<td>Alabama</td>
<td>[40%, 50%]</td>
</tr>
<tr>
<td>Mississippi</td>
<td>(50%, 60%)</td>
</tr>
<tr>
<td>Nevada</td>
<td>4</td>
</tr>
<tr>
<td>Wyoming</td>
<td>(60%, 70%)</td>
</tr>
<tr>
<td>MN</td>
<td>(70%, 80%)</td>
</tr>
</tbody>
</table>

States in red do not currently have lotteries
Pari-mutuel racing frequency

% of population playing...

- Weekly or more: 2% (U.S.), 1% (Minnesota)
- Once or more a month: 3% (U.S.), 2% (Minnesota)
- Several times a year: 4% (U.S.), 4% (Minnesota)
- Once or twice a year: 6% (U.S.), 7% (Minnesota)
- Less often than once a year: 14% (U.S.), 15% (Minnesota)
- Never: 72% (U.S.), 72% (Minnesota)
Pari-mutuel racing participation by state

Percentage of adult population playing in past year

U.S. overall: 14%

- MN: 26
- CA, FL, KY, NJ: 9
- NY: 4
- [4%, 9%]: 11
- (9%, 14%): 26
- (14%, 19%): 9
- (19%, 24%): 4
- (24%, 29%): 1
Past year bingo play by state

U.S. overall: 20%

- HI, ID, NE, UT: 4 states
- MN, NV, NY: 3 states
- MN: 10 states
- TX: 1 state
Past year bingo play by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>25-34</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>35-44</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>45-54</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>55-64</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td>65-74</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>75+</td>
<td>11%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Pull-tabs or break-open tickets by state

- **U.S. overall:** 21%

<table>
<thead>
<tr>
<th>Percent playing in past year</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[10%, 16%]</td>
<td>5</td>
</tr>
<tr>
<td>(16%, 21%)</td>
<td>21</td>
</tr>
<tr>
<td>(21%, 27%)</td>
<td>14</td>
</tr>
<tr>
<td>(27%, 32%)</td>
<td>7</td>
</tr>
<tr>
<td>(32%, 38%)</td>
<td>4</td>
</tr>
</tbody>
</table>

AK, MN, ND, WI

MN
Sports betting
Type of sports betting

Minnesota

- Both: 53%
- Traditional sports: 30%
- Fantasy sports: 17%

U.S.

- Both: 53%
- Traditional sports: 30%
- Fantasy: 17%
Traditional Sports betting
Past year traditional sports betting by state

U.S. overall = 22%

- MN: 23
- NV: 9
- NJ: 2

Percent betting in past year

<table>
<thead>
<tr>
<th>Percent Range</th>
<th>Number of States</th>
</tr>
</thead>
<tbody>
<tr>
<td>[13%, 18%]</td>
<td>17</td>
</tr>
<tr>
<td>(18%, 23%)</td>
<td>23</td>
</tr>
<tr>
<td>(23%, 28%)</td>
<td>9</td>
</tr>
<tr>
<td>(28%, 33%)</td>
<td></td>
</tr>
</tbody>
</table>
Number of sports bet on

Past year sports bettors only

U.S.  | Minnesota
---|---
1 to 2 | 55% | 61%
3 to 5 | 36% | 31%
6 or more | 8% | 7%
Frequency of sports bets

- Weekly or more: 15% (U.S.), 15% (Minnesota)
- 1-3 times a month: 19% (U.S.), 14% (Minnesota)
- Several times a year: 23% (U.S.), 18% (Minnesota)
- Once or twice a year: 26% (U.S.), 28% (Minnesota)
- Less often than once a year: 7% (U.S.), 13% (Minnesota)
How do you make sports bets?

- Social bets with family or friends: 90% in Minnesota, 91% in U.S.
- Online sportsbook: 50% in Minnesota, 62% in U.S.
- "Brick and mortar" sportsbook: 51% in Minnesota, 57% in U.S.
- Bookie/Bookmaker: 28% in Minnesota, 48% in U.S.

Questions asked of sports bettors only.
How do you make sports bets?

- Social bets with family or friends: 47% often, 43% occasionally
- Online sportsbook: 31% often, 19% occasionally
- "Brick and mortar" sportsbook: 41% often, 10% occasionally
- Bookie/Bookmaker: 23% often, 5% occasionally

Questions asked of sports bettors only
What sports have you bet on in past year for real money (Sports bettors only)

- Pro football: 65% (Minnesota), 73% (U.S.)
- College football: 24% (Minnesota), 36% (U.S.)
- Pro basketball: 27% (Minnesota), 30% (U.S.)
- Baseball: 24% (Minnesota), 32% (U.S.)
- College basketball: 10% (Minnesota), 26% (U.S.)
- Soccer: 17% (Minnesota), 29% (U.S.)
- Ice hockey: 11% (Minnesota), 11% (U.S.)
- E-sports: 9% (Minnesota), 11% (U.S.)
- Combat sports: 12% (Minnesota), 11% (U.S.)
- Motor racing: 14% (Minnesota), 10% (U.S.)
- Tennis: 7% (Minnesota), 9% (U.S.)
- Golf: 7% (Minnesota), 7% (U.S.)
What type of sports bet have you made in the past year?

- Single bets on the outcome of a game: 85% in Minnesota, 88% in the U.S.
- Bet on events within a game ("prop bets"): 40% in Minnesota, 42% in the U.S.
- Parlay bets: 23% in Minnesota, 16% in the U.S.
Past year sports betting by gender

Percent betting on sports in past year

<table>
<thead>
<tr>
<th>Gender</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Female</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Past year sports betting by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
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<td>38%</td>
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<td>16%</td>
</tr>
<tr>
<td>55-64</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>65-74</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>75+</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>
How have you played sports contests in the past year?

- With people I know outside of office: 67% (Minnesota), 60% (U.S.)
- Office pool: 47% (Minnesota), 38% (U.S.)
- Online with people I did not know: 33% (Minnesota), 37% (U.S.)
Fantasy sports
Fantasy sports participation

U.S.
- Daily only, 34%
- Traditional season-long only, 44%
- Both DFS and traditional, 22%

Minnesota
- Daily only, 19%
- Traditional season-long only, 45%
- Both DFS and traditional, 36%
Fantasy sports participation by state

- National rate = 17%
- DC, IL, MD, NJ, NY, NC, OH, VA,
- MN
Method of playing traditional fantasy sports leagues

U.S.
- Online only, 50%
- Offline only, 29%
- Both online and offline, 21%

Minnesota
- Online only, 69%
- Offline only, 12%
- Both online and offline, 19%
Fantasy sports played in past year

- **Pro football**: 85% (Minnesota: 69%)  
  - **U.S.**: 85%
- **Baseball**: 33% (Minnesota: 30%)  
  - **U.S.**: 30%
- **Pro basketball**: 24% (Minnesota: 25%)  
  - **U.S.**: 24%
- **College football**: 24% (Minnesota: 14%)  
  - **U.S.**: 14%
- **College basketball**: 13% (Minnesota: 11%)  
  - **U.S.**: 11%
- **Soccer**: 15% (Minnesota: 6%)  
  - **U.S.**: 6%
- **Motor racing**: 11% (Minnesota: 10%)  
  - **U.S.**: 10%
- **E-sports**: 13% (Minnesota: 9%)  
  - **U.S.**: 9%
- **Golf**: 13% (Minnesota: 9%)  
  - **U.S.**: 9%
- **Combat sports**: 7% (Minnesota: 9%)  
  - **U.S.**: 9%
- **Ice hockey**: 20% (Minnesota: 20%)  
  - **U.S.**: 20%
- **Other**: 1% (Minnesota: 9%)  
  - **U.S.**: 9%
Number of fantasy sports bet on

Past year fantasy sports bettors only
Past year fantasy sports betting by gender

Percent betting on fantasy sports in past year

- Male: 24% in the U.S., 22% in Minnesota
- Female: 10% in the U.S., 7% in Minnesota

U.S. | Minnesota
--- | ---
Male | 24% | 22%
Female | 10% | 7%
Past year fantasy sports betting by age

- 18-24: 33%
- 25-34: 38%
- 35-44: 34%
- 45-54: 21%
- 55-64: 15%
- 65+: 6%
Frequency of daily fantasy sports bets

<table>
<thead>
<tr>
<th>Frequency</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly or more</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>1-3 times a month</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Several times a year</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Once or twice a year</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Less often than once a year</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>
“On average, how much do you spend to enter a daily fantasy sports contest?”
Number of traditional fantasy sports leagues

Past year traditional fantasy sports bettors only

- U.S.: 60% in 1-2 leagues, 25% in 3-5 leagues, 7% in 6 or more leagues
- Minnesota: 64% in 1-2 leagues, 26% in 3-5 leagues, 3% in 6 or more leagues
“How much does your traditional, season-long fantasy sports league(s) cost to play?”

<table>
<thead>
<tr>
<th>Cost Range</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>$15 or less</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>$16 to $50</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>$51 to $100</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>$101 to $300</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>$300 to $500</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>More than $500</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Card games
Card game gambling by state

- U.S. overall: 23%

<table>
<thead>
<tr>
<th>Range</th>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>[18%, 22%]</td>
<td>18</td>
</tr>
<tr>
<td>(22%, 26%)</td>
<td>16</td>
</tr>
<tr>
<td>(26%, 29%)</td>
<td>14</td>
</tr>
<tr>
<td>(29%, 33%)</td>
<td>1</td>
</tr>
<tr>
<td>(33%, 37%)</td>
<td>2</td>
</tr>
</tbody>
</table>

- MN
- NV, NY
- NJ
What type of card games have you wagered money on in the past year?

- **Blackjack**: 80% (Minnesota) 77% (U.S.)
- **Poker**: 61% (Minnesota) 60% (U.S.)
- **Other**: 13% (Minnesota) 10% (U.S.)
- **Pai Gow**: 8% (Minnesota) 6% (U.S.)
- **Baccarat**: 7% (Minnesota) 5% (U.S.)
- **Cribbage**: 16% (Minnesota) 6% (U.S.)

As asked of past year card players only.
Where have you played poker?

- **Casino**
  - Minnesota: 59%
  - U.S.: 65%

- **Someone's home**
  - Minnesota: 60%
  - U.S.: 65%

- **Card club or racetrack**
  - Minnesota: 21%
  - U.S.: 14%

- **Bar or restaurant**
  - Minnesota: 21%
  - U.S.: 13%

- **Somewhere else**
  - Minnesota: 4%
  - U.S.: 4%

*Asked of past year poker players only*
Where have you played blackjack?

- Casino: 87% (Minnesota 79%, U.S. 49%)
- Someone's home: 49% (Minnesota 38%, U.S. 11%)
- Card club or racetrack: 12% (Minnesota 11%, U.S. 9%)
- Bar or restaurant: 11% (Minnesota 11%, U.S. 3%)
- Somewhere else: 3% (Minnesota 3%, U.S. 3%)

Asked of past year blackjack players only
Gaming machines
Gaming machine play by state

November 2018 NGAGE Survey - Minnesota

U.S. overall: 32%

Past year gaming machine wagering

Number of states

- [18%, 23%]: 8 states
- [23%, 28%]: 9 states
- [28%, 33%]: 10 states
- [33%, 38%]: 14 states
- [38%, 43%]: 7 states
- [43%, 48%]: 2 states
- [48%, 53%]: 0 states
- [53%, 58%]: 0 states
- [58%, 63%]: 1 state

State distribution:
- MN: 14
- AZ: 9
- NY: 10
- NV: 1

Overall percentage: 32%
Where did you play slots, VLTs or other gaming machines in the past year?

- **Casino**
  - Minnesota: 86%
  - U.S.: 94%

- **Bar or restaurant**
  - Minnesota: 21%
  - U.S.: 20%

- **Convenience store**
  - Minnesota: 9%
  - U.S.: 14%

- **Racetrack**
  - Minnesota: 6%
  - U.S.: 12%

- **Other**
  - Minnesota: 2%
  - U.S.: 4%
Frequency of gaming machine play

- Weekly or more: 6% U.S., 3% Minnesota
- 1-3 times a month: 10% U.S., 11% Minnesota
- Several times a year: 19% U.S., 18% Minnesota
- Once or twice a year: 22% U.S., 24% Minnesota
- Less often than once a year: 43% U.S., 44% Minnesota
Past year gaming machine betting by gender

Percent playing slots, VLTs or other gaming machines in past year

- Male: 37% (U.S.), 38% (Minnesota)
- Female: 27% (U.S.), 29% (Minnesota)
Past year gaming machine betting by age

<table>
<thead>
<tr>
<th>Age Group</th>
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<th>Minnesota</th>
</tr>
</thead>
<tbody>
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<td>38%</td>
</tr>
<tr>
<td>35-44</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>45-54</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>55-64</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>65+</td>
<td>24%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Online gambling
What type of gambling have you done online, on a website, or on a mobile app in the past year?

- **Poker**: Minnesota 35%, U.S. 33%
- **Slots**: Minnesota 28%, U.S. 30%
- **Table games (blackjack, roulette, etc)**: Minnesota 23%, U.S. 23%
- **Bingo**: Minnesota 22%, U.S. 23%
- **Raffles**: Minnesota 19%, U.S. 19%
- **eSports**: Minnesota 15%, U.S. 15%
- **Horse race**: Minnesota 10%, U.S. 13%
- **Virtual sports**: Minnesota 11%, U.S. 13%
- **Non-sporting events (elections, Oscars, etc.)**: Minnesota 8%, U.S. 7%
Casinos
Casino betting by state

National rate = 37%
Why have you visited a casino in the past year?

- Mostly to gamble, but also to socialize: 44% (Minnesota), 51% (U.S.)
- Just to gamble: 31% (Minnesota), 27% (U.S.)
- Mostly to socialize, but sometimes to gamble: 23% (Minnesota), 20% (U.S.)
- Only to socialize: 2% (Minnesota), 3% (U.S.)

Asking of casino-goers only.
What types of casinos have you been to in the past year?

<table>
<thead>
<tr>
<th>Type</th>
<th>Minnesota</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home state</td>
<td>90%</td>
<td>65%</td>
</tr>
<tr>
<td>Neighboring state</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>Las Vegas/Nevada</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>Atlantic City</td>
<td>2%</td>
<td>12%</td>
</tr>
<tr>
<td>Elsewhere in the U.S.</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Outside the U.S.</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Riverboat</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Cruise ship</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Asking of casino-goers only
Past year casino attendance by gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>43%</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>30%</td>
<td>41%</td>
</tr>
</tbody>
</table>
Past year casino attendance by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>28%</td>
<td>45%</td>
</tr>
<tr>
<td>25-34</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>35-44</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>45-54</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>55-64</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>65+</td>
<td>32%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Positive play
What is positive play?

• It’s a tool designed to measure responsible gambling beliefs and behavior
  • Developed by Richard Wood, Michael Wohl, Nassim Tabri and Kahlil Philander (2016)

• It emphasizes positive experiences over negative warnings

• The positive play scale measures four dimensions of positive play:
  • Honesty and control
  • Pre-commitment
  • Personal responsibility
  • Positive accurate beliefs about gambling

• The NGAGE study focused on personal responsibility and accurate beliefs
Past year positive play – personal responsibility

I should be aware of how much money I spend when I gamble

I should only gamble when I have money to cover bills and living expenses

It's my responsibility to spend only money that I can afford to lose

I should be able to walk away from gambling at any time

Questions asked of past year gamblers only
Past year positive play – gambling literacy

- Gambling is not a good way to make money (% agreeing): 81% (Minnesota) vs. 74% (U.S.)
- If I gamble more often it will help me to win more than I lose (% disagreeing): 81% (Minnesota) vs. 73% (U.S.)
- My chances of winning get better after I've lost (% disagreeing): 76% (Minnesota) vs. 69% (U.S.)

Questions asked of past year gamblers only
Positive play by age – “I should be able to walk away from gambling at any time”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>64%</td>
<td>69%</td>
</tr>
<tr>
<td>25-34</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>35-44</td>
<td>70%</td>
<td>79%</td>
</tr>
<tr>
<td>45-54</td>
<td>77%</td>
<td>87%</td>
</tr>
<tr>
<td>55-64</td>
<td>80%</td>
<td>86%</td>
</tr>
<tr>
<td>65+</td>
<td>85%</td>
<td>88%</td>
</tr>
</tbody>
</table>

Percent strongly agreeing
Positive play by age – “I should be aware of how much money I spend when I gamble”

Percent strongly agreeing

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>67%</td>
<td>61%</td>
</tr>
<tr>
<td>25-34</td>
<td>64%</td>
<td>68%</td>
</tr>
<tr>
<td>35-44</td>
<td>68%</td>
<td>84%</td>
</tr>
<tr>
<td>45-54</td>
<td>73%</td>
<td>81%</td>
</tr>
<tr>
<td>55-64</td>
<td>79%</td>
<td>83%</td>
</tr>
<tr>
<td>65+</td>
<td>83%</td>
<td>77%</td>
</tr>
</tbody>
</table>

November 2018 NGAGE Survey - Minnesota
Positive play by age – “It’s my responsibility to spend only money that I can afford to lose”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>25-34</td>
<td>65%</td>
<td>71%</td>
</tr>
<tr>
<td>35-44</td>
<td>67%</td>
<td>77%</td>
</tr>
<tr>
<td>45-54</td>
<td>74%</td>
<td>90%</td>
</tr>
<tr>
<td>55-64</td>
<td>82%</td>
<td>84%</td>
</tr>
<tr>
<td>65-74</td>
<td>85%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Percent strongly agreeing
Positive play by age – “I should only gamble when I have money to cover my bills and living expenses”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>57%</td>
<td>71%</td>
</tr>
<tr>
<td>25-34</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>35-44</td>
<td>68%</td>
<td>81%</td>
</tr>
<tr>
<td>45-54</td>
<td>71%</td>
<td>82%</td>
</tr>
<tr>
<td>55-64</td>
<td>75%</td>
<td>83%</td>
</tr>
<tr>
<td>65+</td>
<td>79%</td>
<td>79%</td>
</tr>
</tbody>
</table>

Percent strongly agreeing
Positive play by age – “Gambling is not a good way to make money”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>27%</td>
<td>42%</td>
</tr>
<tr>
<td>25-34</td>
<td>36%</td>
<td>43%</td>
</tr>
<tr>
<td>35-44</td>
<td>48%</td>
<td>61%</td>
</tr>
<tr>
<td>45-54</td>
<td>55%</td>
<td>69%</td>
</tr>
<tr>
<td>55-64</td>
<td>63%</td>
<td>70%</td>
</tr>
<tr>
<td>65+</td>
<td>72%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Percent strongly agreeing
Positive play by age – “If I gamble more often, it will help me to win more than I lose”

Percent strongly disagreeing

<table>
<thead>
<tr>
<th>Age</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>25-34</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>35-44</td>
<td>41%</td>
<td>52%</td>
</tr>
<tr>
<td>45-54</td>
<td>53%</td>
<td>66%</td>
</tr>
<tr>
<td>55-64</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>65+</td>
<td>70%</td>
<td>71%</td>
</tr>
</tbody>
</table>
Positive play by age – “My chances of winning get better after I’ve lost”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>25-34</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>35-44</td>
<td>39%</td>
<td>52%</td>
</tr>
<tr>
<td>45-54</td>
<td>49%</td>
<td>66%</td>
</tr>
<tr>
<td>55-64</td>
<td>58%</td>
<td>60%</td>
</tr>
<tr>
<td>65+</td>
<td>69%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Percent strongly disagreeing
Sports gamblers vs non-sports gamblers
Past year positive play – personal responsibility

I should be aware of how much money I spend when I gamble
- Sports gamblers: 87%
- Non-sports gamblers: 93%

I should only gamble when I have money to cover bills and living expenses
- Sports gamblers: 89%
- Non-sports gamblers: 91%

It's my responsibility to spend only money that I can afford to lose
- Sports gamblers: 91%
- Non-sports gamblers: 94%

I should be able to walk away from gambling at any time
- Sports gamblers: 91%
- Non-sports gamblers: 94%

Questions asked of past year gamblers only
Minnesota sports gamblers vs non-sports gamblers
Past year positive play – personal responsibility
Percent strongly agreeing

<table>
<thead>
<tr>
<th>Statement</th>
<th>Non-sports gamblers</th>
<th>Sports gamblers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I should be aware of how much money I spend when I gamble</td>
<td>68%</td>
<td>80%</td>
</tr>
<tr>
<td>I should only gamble when I have money to cover bills and living expenses</td>
<td>71%</td>
<td>80%</td>
</tr>
<tr>
<td>It's my responsibility to spend only money that I can afford to lose</td>
<td>70%</td>
<td>81%</td>
</tr>
<tr>
<td>I should be able to walk away from gambling at any time</td>
<td>69%</td>
<td>83%</td>
</tr>
</tbody>
</table>

Questions asked of past year gamblers only

November 2018 NGAGE Survey - Minnesota
Minnesota sports gamblers vs non-sports gamblers
Past year positive play – gambling literacy

- My chances of winning get better after I've lost
  - Sports gamblers: 52%
  - Non-sports gamblers: 76%

- If I gamble more often it will help me to win more than I lose
  - Sports gamblers: 52%
  - Non-sports gamblers: 81%

- Gambling is a good way to make money
  - Sports gamblers: 60%
  - Non-sports gamblers: 77%
Minnesota Sports gamblers vs non-sports gamblers
Past year positive play – gambling literacy
% strongly disagreeing

- **My chances of winning get better after I've lost**
  - Sports gamblers: 41%
  - Non-sports gamblers: 54%

- **If I gamble more often it will help me to win more than I lose**
  - Sports gamblers: 35%
  - Non-sports gamblers: 60%

- **Gambling is a good way to make money**
  - Sports gamblers: 29%
  - Non-sports gamblers: 57%
Public opinion
If your state were to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?

<table>
<thead>
<tr>
<th>Importance Level</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>No opinion</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Somewhat unimportant</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Very unimportant</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>
If your state were to legalize/has legalized sports betting, how important is it to require operators to implement responsible gambling measures?

U.S. overall: 63%

- [55%, 59%]: 9
- (59%, 63%): 21
- (63%, 67%): 17
- (67%, 71%): 4

HI, ME, NJ, TN
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?

- **Very important**
  - U.S.: 21%
  - Minnesota: 22%

- **Somewhat important**
  - U.S.: 32%
  - Minnesota: 32%

- **No opinion**
  - U.S.: 22%
  - Minnesota: 20%

- **Somewhat unimportant**
  - U.S.: 14%
  - Minnesota: 16%

- **Very unimportant**
  - U.S.: 12%
  - Minnesota: 10%
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues to treat people who develop gambling problems?

U.S. overall: 52%
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?

<table>
<thead>
<tr>
<th>Importance</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>No opinion</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Somewhat unimportant</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Very unimportant</td>
<td>11%</td>
<td>10%</td>
</tr>
</tbody>
</table>
If your state were to legalize/has legalized sports betting, how important is it to set aside revenues for public awareness campaigns?

U.S. overall: 56%

- MN: 19
- AK, CA, UT, WY: 4
- (50%, 54%): 17
- (54%, 57%): 19
- (57%, 61%): 11
- (61%, 64%): 11
Addiction to gambling is a lot like addiction to drugs or alcohol

- **4%** strongly disagree
- **7%** disagree somewhat
- **14%** neutral
- **38%** agree somewhat
- **35%** strongly agree

- **4%** strongly disagree
- **5%** disagree somewhat
- **15%** neutral
- **37%** agree somewhat
- **42%** strongly agree
Addiction to gambling is a lot like addiction to drugs and alcohol

U.S. overall: 75%

- CA, DC, FL, NH, NY, VA: 6
- DE, ID, IA, MD, NE, NM, ND, RI: 8

Percent agreeing
- [69%, 72%] 16
- (72%, 75%): MN 21
- (75%, 78%)
- (78%, 81%)

Number of states
% agreeing that addiction to gambling is a lot like addiction to drugs or alcohol, by age

Overall agreement: 75%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

18-24 63% 18-24 67%
25-34 66% 25-34 73%
35-44 72% 35-44 74%
45-54 76% 45-54 81%
55-64 80% 55-64 77%
65+ 85% 65+ 81%

Percent agreeing

U.S. Minnesota

November 2018 NGAGE Survey - Minnesota
People with a gambling problem are unlikely to recover or get better

- **U.S.**
- **Minnesota**

<table>
<thead>
<tr>
<th>Opinion</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>34%</td>
<td>39%</td>
</tr>
<tr>
<td>Neutral</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Services to treat compulsive gambling are available in my community

- Strongly disagree: 6% (U.S.), 4% (Minnesota)
- Disagree somewhat: 9% (U.S.), 10% (Minnesota)
- Neutral: 47% (U.S.), 42% (Minnesota)
- Agree somewhat: 25% (U.S.), 28% (Minnesota)
- Strongly agree: 13% (U.S.), 16% (Minnesota)
Services to treat compulsive gambling are available in my community

- AK, AL, GA, HI, NH, UT, VT, WY (8 states)
- MN (21 states)
- DE, IA, LA, ND, SD, OR (6 states)
- NV (1 state)

U.S. overall: 38%

Percent agreeing:
- [21%, 29%] (15 states)
- (29%, 38%) (8 states)
- (38%, 46%) (21 states)
- (46%, 55%) (6 states)
- (55%, 63%) (0 states)
- (63%, 71%) (1 state)
If someone close to me had a gambling problem, I would know where to get them help

- **Strongly disagree**: 13% (U.S.) 10% (Minnesota)
- **Disagree somewhat**: 25% (U.S.) 24% (Minnesota)
- **Neutral**: 25% (U.S.) 25% (Minnesota)
- **Agree somewhat**: 26% (U.S.) 30% (Minnesota)
- **Strongly agree**: 12% (U.S.) 10% (Minnesota)
If someone close to me had a gambling problem, I would know where to get them help

U.S. overall: 38%
If someone in my family had a gambling problem, I would advise them not to discuss it with anyone outside the family

<table>
<thead>
<tr>
<th>Statement</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Neutral</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>
If someone in my family had a gambling problem, I would advise them not to discuss it with anyone outside the family.
% agreeing that if someone in their family had a gambling problem, they would advise them not to discuss it outside the family, by age

Overall agreement: 19%

Percent agreeing

- 18-24: 31%
- 25-34: 26%
- 35-44: 22%
- 45-54: 19%
- 55-64: 17%
- 65+: 15%

U.S. vs Minnesota
People with a gambling problem are below average in intelligence

<table>
<thead>
<tr>
<th>Percentage</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Neutral</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>
People with a gambling problem are below average in intelligence

U.S. overall: 10%

- MN: 39
- CA, TX: 10
- Other states: 2
% agreeing that people with a gambling problem are below average in intelligence, by age

Overall agreement: 10%

Percent agreeing

18-24: 15% (U.S.), 14% (Minnesota)
25-34: 17% (U.S.), 12% (Minnesota)
35-44: 12% (U.S.), 6% (Minnesota)
45-54: 8% (U.S.), 7% (Minnesota)
55-64: 5% (U.S.), 1% (Minnesota)
65+: 4% (U.S.), 5% (Minnesota)
People with a gambling problem are to blame for their problems

- **Strongly disagree**: 7% (U.S.), 7% (Minnesota)
- **Disagree somewhat**: 15% (U.S.), 18% (Minnesota)
- **Neutral**: 27% (U.S.), 26% (Minnesota)
- **Agree somewhat**: 34% (U.S.), 37% (Minnesota)
- **Strongly agree**: 17% (U.S.), 12% (Minnesota)
People with a gambling problem are to blame for their problems

U.S. overall: 51%

- MN: 23 states
- DC, MA, RI, VT: 4 states
- (45%, 49%): 12 states
- (49%, 53%): 12 states
- (53%, 57%): 12 states
% agreeing that people with a gambling problem are to blame for their problems, by age

Overall agreement: 51%

U.S. | Minnesota
---|---
18-24 | 39% | 45%
25-34 | 49% | 43%
35-44 | 49% | 48%
45-54 | 55% | 47%
55-64 | 57% | 49%
65+ | 53% | 60%
The gambling industry should do more to help people with a gambling addiction

<table>
<thead>
<tr>
<th>Opinion</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Neutral</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>27%</td>
<td>27%</td>
</tr>
</tbody>
</table>
The gambling industry should do more to help people with a gambling addiction.

U.S. overall: 63%

Number of states

Percent agreeing

[58%, 62%] 13
(62%, 66%) 14
(66%, 70%) 24

MN
The government should do more to help people with a gambling addiction

- **Strongly disagree**: 8% (U.S.), 8% (Minnesota)
- **Disagree somewhat**: 13% (U.S.), 15% (Minnesota)
- **Neutral**: 36% (U.S.), 33% (Minnesota)
- **Agree somewhat**: 27% (U.S.), 30% (Minnesota)
- **Strongly agree**: 16% (U.S.), 14% (Minnesota)
The government should do more to help people with a gambling addiction.

U.S. overall: 43%

<table>
<thead>
<tr>
<th>Percent agreeing</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[34%, 39%]</td>
<td>4</td>
</tr>
<tr>
<td>(39%, 43%)</td>
<td>18</td>
</tr>
<tr>
<td>(43%, 48%)</td>
<td>18</td>
</tr>
<tr>
<td>(48%, 53%)</td>
<td>7</td>
</tr>
<tr>
<td>(53%, 58%)</td>
<td>4</td>
</tr>
</tbody>
</table>
Gambling is immoral

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Disagree somewhat</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>Neutral</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Agree somewhat</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Gambling is immoral.

- U.S. overall: 14%
- MN: 26%
- [9%, 13%]: 21
- (13%, 16%]: 26
- (16%, 20%]: 1
- (20%, 23%]: 3
- AL, MS, UT: 3
% agreeing that gambling is immoral, by age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Overall</th>
<th>U.S.</th>
<th>Minnesota</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>17%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>25-34</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>35-44</td>
<td>13%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>45-54</td>
<td>13%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>55-64</td>
<td>12%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>65+</td>
<td>12%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Overall agreement 13%
Gambling is against my religion

- **Strongly disagree**: 40% (U.S.), 42% (Minnesota)
- **Disagree somewhat**: 18% (U.S.), 21% (Minnesota)
- **Neutral**: 25% (U.S.), 24% (Minnesota)
- **Agree somewhat**: 9% (U.S.), 8% (Minnesota)
- **Strongly agree**: 8% (U.S.), 5% (Minnesota)
Gambling is against my religion

<table>
<thead>
<tr>
<th>Percent agreeing</th>
<th>Number of states</th>
</tr>
</thead>
<tbody>
<tr>
<td>[8%, 14%]</td>
<td>14</td>
</tr>
<tr>
<td>(14%, 19%</td>
<td>24</td>
</tr>
<tr>
<td>(19%, 25%</td>
<td>9</td>
</tr>
<tr>
<td>(25%, 31%</td>
<td>3</td>
</tr>
<tr>
<td>(31%, 37%</td>
<td>0</td>
</tr>
<tr>
<td>(37%, 42%</td>
<td>0</td>
</tr>
<tr>
<td>(42%, 48%</td>
<td>1</td>
</tr>
</tbody>
</table>

U.S. overall: 18%
How likely is this to cause a gambling problem?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Somewhat likely</th>
<th>Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having an addictive personality</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Being around people who gamble a lot</td>
<td>51%</td>
<td>33%</td>
</tr>
<tr>
<td>Not having enough willpower</td>
<td>50%</td>
<td>29%</td>
</tr>
<tr>
<td>Winning a lot of money</td>
<td>50%</td>
<td>28%</td>
</tr>
<tr>
<td>Having parent/family member who gambles</td>
<td>53%</td>
<td>23%</td>
</tr>
<tr>
<td>Seeing a lot of ads</td>
<td>44%</td>
<td>12%</td>
</tr>
<tr>
<td>Traumatic event</td>
<td>43%</td>
<td>12%</td>
</tr>
<tr>
<td>Moral weakness</td>
<td>39%</td>
<td>13%</td>
</tr>
<tr>
<td>Genetics or medical condition</td>
<td>34%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Minnesota data

85% 84% 79% 78% 76% 56% 55% 52%
How likely is this to cause a gambling problem?

- Genetics or medical condition
- Moral weakness
- Winning a lot of money
- Traumatic event
- Not having enough willpower
- Seeing a lot of ads
- Having parent/family member who gambles
- Having an addictive personality
- Being around people who gamble a lot

<table>
<thead>
<tr>
<th>Factor</th>
<th>Minnesota</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genetics or medical condition</td>
<td>88%</td>
<td>83%</td>
</tr>
<tr>
<td>Moral weakness</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Winning a lot of money</td>
<td>76%</td>
<td>78%</td>
</tr>
<tr>
<td>Traumatic event</td>
<td>59%</td>
<td>55%</td>
</tr>
<tr>
<td>Not having enough willpower</td>
<td>77%</td>
<td>79%</td>
</tr>
<tr>
<td>Seeing a lot of ads</td>
<td>56%</td>
<td>53%</td>
</tr>
<tr>
<td>Having parent/family member who gambles</td>
<td>81%</td>
<td>76%</td>
</tr>
<tr>
<td>Having an addictive personality</td>
<td>88%</td>
<td>85%</td>
</tr>
<tr>
<td>Being around people who gamble a lot</td>
<td>84%</td>
<td>83%</td>
</tr>
</tbody>
</table>
% agreeing that moral weakness is likely to cause a gambling problem

- U.S. overall: 52%
- MN
- DC, MA, NH, OR, RI
- HI, MS, OK
- [42%, 46%]
- (46%, 50%)
- (50%, 54%)
- (54%, 58%)
- (58%, 62%)

Number of states

Percent agreeing
% agreeing that an addictive personality is likely to cause a gambling problem

![Chart showing distribution of percentages agreeing with the statement.]

- U.S. overall: 85%
- DC, MS, NY, TX: 4
- MN: 17

[79%, 83%] (83%, 86%) (86%, 90%]

Number of states
% agreeing that not having enough willpower is likely to cause a gambling problem

U.S. overall: 78%

MN: 25
DC: 1
MA, NH: 2

Percent agreeing

Number of states

[66%, 70%] [70%, 74%] [74%, 77%] [77%, 81%]
% agreeing that being around people who gamble a lot is likely to cause a gambling problem
% agreeing that having a parent or family member who gambles is likely to cause a gambling problem in Minnesota.

- U.S. overall: 75%
- Minnesota: 119

Percent agreeing:
- [71%, 75%] (11 states)
- (75%, 79%)
- (79%, 83%)

Number of states
% agreeing that a traumatic event in someone’s life is likely to cause a gambling problem

U.S. overall: 55%

- [52%, 55%]: 12 states
- (55%, 58%): 27 states
- (58%, 61%): 12 states

Percent agreeing
% agreeing that a person’s genetics or other medical condition is likely to cause a gambling problem

U.S. overall: 43%

MN: 27

[38%, 42%]: 5

(42%, 47%): 19

(47%, 51%):
% agreeing that seeing a lot of ads promoting gambling is likely to cause a gambling problem

U.S. overall: 56%

- CA, NY, NC, RI, WV
- MN: 25
- [50%, 54%]: 7
- (54%, 58%): 14
- (58%, 62%): 5
- (62%, 66%):
% agreeing that winning a lot of money is likely to cause a gambling problem

U.S. overall: 77%

- MN: 23
- NH: 11
- MN: 16
Segments
What is segmentation?

• Segmentation is the division of a population into groups based on the similarity of their responses to survey questions

• Segmentation employs multiple mathematical techniques which are analyzed and interpreted by project researchers

• Researchers assign names to segments to aid in interpretation

• The analysis was done nationally, though the size of each segment varies from state to state

• This segmentation was based on responses to questions about attitudes and beliefs about problem gambling

• Four segments were identified, each encompassing roughly \( \frac{1}{4} \) of the population
Responsible Gamblers

• Believe that genetics, medical issues, traumatic experience can cause gambling problems
• Do not believe gambling problems result from moral weakness
• Believe in effective recovery
• Know where to get help
• Endorse more services
• 81% past year gambling
• Bet on games of chance
• Endorse positive play and have low rates of risky behavior
• 33% of Minnesota adults
It’s Your Fault

• Do not believe that genetics, medical issues, traumatic experience can cause gambling problems
• Believe gambling problems result from lack of willpower and believe gamblers are to blame
• Do not support more services
• Do not believe gambling is immoral
• 87% past year gambling
• Bet on games of chance and games of skill
• Average levels of positive play and risky play
• 19% of Minnesota adults
Moralists

- Most likely to believe that gambling is immoral and against their religion
- Believe gambling problems result from lack of willpower and moral weakness and believe gamblers are to blame
- Somewhat supportive of more services
- Not aware of services
- 58% past year gambling (mostly lottery)
- Average levels of positive play and risky play
- 24% of Minnesota adults
Invulnerables

• Most likely to stigmatize those with gambling problems
• Most likely to believe problem gambling comes from moral weakness and to believe gamblers are to blame
• Not supportive of more services
• Most likely to believe gambling is immoral
• 70% past year gambling
• Most likely to bet on sports
• Highest levels of risky play and lowest levels of positive play (by far)
• 24% of Minnesota adults
Segments

U.S.

- Invulnerables: 27%
- Responsible Gamblers: 25%
- Moralists: 26%
- It's Your Fault: 22%

Minnesota

- Invulnerables: 24%
- Responsible Gamblers: 33%
- Moralists: 24%
- It's Your Fault: 19%